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ABSTRACT

This checklist was developed to aid elementary school principals in long range planning for the school year. It is the product of the Management for Effective Teaching (MET) Project, which is funded by the Fairfax County (Virginia) Public Schools, and which is responsible for developing materials to help to implement objectives of the Program of Studies, the school district's curriculum. Items for consideration are offered on principals' responsibilities concerning: (1) professional staff; (2) support staff; (3) parents and community; (4) instructional program; (5) student population; (6) physical plant; (7) calendar and time; (8) budget matters; (9) special programs and special services; (10) publications; (11) evaluation; (12) first day/first week planning; and (13) end of the year planning. (JD)

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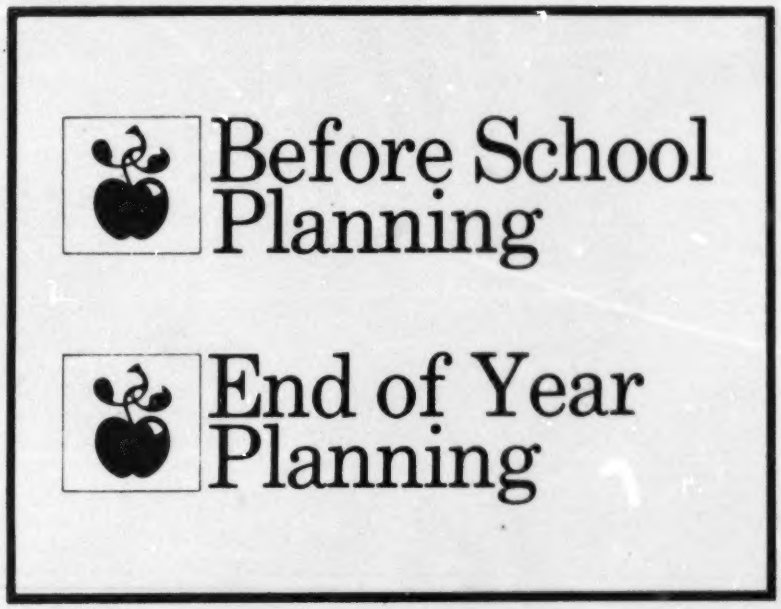
A Sample

PRINCIPAL'S PLANNING CHECK LIST



MET

A TITLE IV-C PROJECT

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FAIRFAX COUNTY PUBLIC SCHOOLS
Department of Instruction ■ Office of Elementary Education ■ 1982

SP 020 491

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I. Professional Staff

____ List items to discuss with new teachers in August and September; draft agendas; keep notes for subsequent meetings during the year.

____ Call Personnel to request Orientation Handbooks for New Teachers; confirm in writing.

____ Scan County Book* of directives; make notes of where certain information can be found; keep this reference with Administrative Handbook.

____ Prepare welcome letter to teachers; include Area/County inservice assignments if possible.

____ Assign teachers to attend Area/County inservice in August; include schedule in the letter to teachers, if possible.

____ Get personnel vacancies filled; confirm requests in writing to Personnel.

____ Assign teachers to

. teams
. rooms
. grades (Continually update by enrollment change.)

Prepare list for distribution.

____ List references to be used by teachers in long-range planning and guidelines for team meetings (including agendas and summaries); incorporate into the Staff Handbook.

____ Write out:

. plans to meet guidelines
. projected teaming procedures if applicable
. library schedule or other plan.

Discuss plans with teachers in August and include the approved information in the Staff Handbook.

____ Analyze latest test data; prepare information to be discussed with the staff; request assistance as needed from the Area staff.

____ Review Program of Studies (POS); know format and general content for all curriculum areas; make summary planning notes as appropriate for Faculty Meeting Folder; discuss in August meetings.

[NOTE: Faculty Meeting Folder is kept up to date and with easy access for staff to review frequently.]

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* Policies, Bylaws and Regulations, Fairfax County Schools, Fairfax, Virginia Volumes I-VI 0000-7999

____ Plan the topics to be discussed in the last big meeting before the first day of school and draft the agenda to include all operational procedures.

____ Appoint teachers for faculty committees; consider their requests; call chairpersons of the major committees before teachers report to work; distribute information in the August meetings.

____ Identify teams of teachers for supply distribution; issue list to teachers in August.

____ Organize information for calling substitutes; send to Sub Central preferred list of substitutes.

____ Delineate procedures for student teachers; update teacher assignments, if needed, coordinating with Area Instructional Services Coordinator; notify appropriate persons in writing.

____ Assess/review strengths of classroom teachers before assigning students.

____ Prepare a weekly teacher duty schedule for the year; select carefully the users of the intercom; rotate those assigned outside last year to inside if possible.

____ Prepare a monthly bulletin board schedule with criteria for content and display; motivate individuals in advance for better selection and preparation of displays.

____ Draft for distribution (and posting) a schedule for care of the faculty lounge, and responsibility for official faculty bulletin board.

____ Verify bus schedules to assure coverage of entire attendance area; prepare for distribution to parents.

____ Review and post regulation on work injuries and list of doctors (4432.2)*; discuss in August meetings.

____ Set up folders similar to Faculty Meeting Folder on these topics:

. PTA Minutes
. Meetings with Specialists
. Staff Newsletter
. Calendar Planning
. Memos to Staff
. Planning Materials (for year)
. Faculty Meetings
. EBO Plans and Work
. Special Students Identified (to monitor during Year)
. (Other folders temporarily or long-range as needed)

____ Call teachers whose grade assignment is changed.

____ Study Civil Service Manual (Chapter 12 in depth); note in detail the procedures regarding improvement periods and termination.

____ Review regulation on Advisory Councils (4010.1)*; identify members from last year and determine procedures for current year; update Staff Handbook if needed.

____ Plan inservice meetings for the year; draft agendas and list professional duties of teachers; order refreshments. Staff development programs might include the following:

. Presentation of the fundamental concepts of child development and human development, procedures for diagnosis of individual needs of students.

. Instructional session on how to develop and implement goals and objectives for teachers, the school, and the students.

. A teacher self-evaluation study.

. Workshops in each curriculum area, in use of all audiovisual/computer technology, in use of community as a resource, in successful parent/teacher conferences, and in the use of the professional library.

. A session on managing the planning process to enable students to have the greatest amount of learning time in the classroom.

____ Establish official bulletin board for teachers; post appropriate information.

____ Determine and communicate fire drill and other emergency procedures; update Staff Handbook.

____ Organize time and mark calendar for

. Education by Objectives activities

  Required meetings
  Projected number of observations and conferences for given periods of time
  Due dates for reports

. Major topics of inservice by blocks of time; meetings to involve staff in plans

. Peak work loads, such as report cards, administration, reporting, testing

. Weekly and monthly routine jobs, such as:

Newsletter due to secretary by Thursday noon
Read all Monday teacher or team-meeting summaries by Wednesday
Assure that student work folders are sent home at least every third Friday
Verify various payrolls, bi-weekly or monthly
Attend PTA Executive and General meetings

___ Develop:

. Management Plan - Target Dates and Assigned Responsibilities

. A Community Profile; include social classes, community leaders and power structure, cultural values, interest groups and pressure groups. Assessment of needs and expectations of the community.

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II. Support Staff

____ Plan a coffee or lunch for the secretaries and custodians in August.

____ Meet with head custodian and make updated work schedule for the coming year; record on a building guide the areas assigned to each person; post copy on custodians' bulletin board.

____ Establish plans for regular communication meetings with secretaries and custodians; keep list or folder of items to be discussed.

____ Review Food Service Manual and note in detail the procedures for frequent use and topics for occasional reference.

____ Review evaluation procedures for all Support Services personnel (secretaries, custodians, food services); organize administrative activities for implementation.

____ Describe for office staff the lines of authority and communication

. in the school
. in the central and area offices.

____ Complete and communicate orientation information for new secretaries.

____ Update, with their input, job descriptions of all Support Services personnel.

____ Review with secretary procedures for supply distribution.

____ Write and submit an updated Security Schedule.

____ Identify August dates of annual leave previously approved for custodians, to determine availability of local help to open school.

____ Meet with office staff to

. plan long-range through August
. establish office procedures
. delegate major duties
. discuss guidelines for interruptions
. record on agenda other ideas generated.

____ Update, with assistance from secretary, written directions for each major office job; compile into Office Handbook. Include sample documents.

____ Post seniority list of custodians. (There should be a print-out.) Discuss overtime procedures with them.

____ Inform secretary of whereabouts at all times, in August and during the year.

____ Establish with secretary a box in teachers' lounge for information on college courses; make it look attractive and label it for content.

____ Update door-locking/unlocking schedule; discuss with custodian; post copy on custodians' bulletin board.

____ Establish procedures, posting copy, for

. day custodian to check building and grounds immediately upon arrival for safety, vandalism, irregularities; etc. and to report immediately any problems.

. head night custodian to inspect premises before/after community/ recreation use and leave the completed, signed forms with a note to principal regarding any problem or irregularity from the evening/night.

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III. Parents and Community

____ Drive through the communities and become familiar with streets, bus stops, walking crossings, and potentially hazardous situations in the school attendance area. Make notes for planning and follow-up.

____ Determine the geographic division for a.m. and p.m. kindergarten; post and send to local newspapers.

____ Meet with PTA president; keep a list of topics.

____ Determine Parent-Teacher Association (PTA) activities, the role of administrators in Executive Meetings, teacher representatives, and teacher requests; update Staff Handbook as needed and discuss in August meetings.

____ Plan "Back to School", the parent orientation program.

____ Use as a handout, Home/School Communication: Suggestions for Parents from the MET kit.

____ Plan parent orientation/review of school-based G/T.

____ Make orders with Parent-Teachers Association (PTA) funds if available.

____ Prepare pupil assignment letters; attach bus information.

____ Prepare special attachment of kindergarten information.

____ Communicate procedures for parent observation; develop a guideline form of instructions to be given to a visitor.

____ Inform family to advise secretary (when the admin. is busy) whether or not

. call should be returned
. message should be given
. immediate contact is necessary

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IV. Instructional Program

____ Review textbooks and supplementary materials in the building and the current order; review projected enrollment by grade and amend order if necessary.

____ Review Program Audit standards and incorporate as appropriate into planning for the year; file notes/references in Faculty Meeting Folder; include information in Staff Handbook.

____ Follow up Area inservice on new textbooks; conduct inservice on basal reading materials for new teachers.

____ Review regulations about required committees and community involvement; Human Relations, Religion, etc. Comply.

____ Write master schedule for lunch, language arts, math, P.E., music; follow guidelines to prevent fragmentation.

____ Peruse Staff Handbook in light of County/Area goals and write information as needed on instructional topics and procedures.

____ Revise/develop as needed the forms for teacher's records of instructional groups in reading, spelling, and math; include instructions in Staff Handbook.

____ Complete personnel references as requested.

____ Update/prepare materials for substitute folders; distribute to teachers in August.

____ List items which each team/grade/teacher should use (professional information and/or textbook materials.

____ Request librarian to list for distribution in August, (1) the items to be checked out by teachers for the year, and (2) the collection of non-textbook instructional materials in the library; keep copies of the lists in the file and update during the year as materials are received for distribution.

____ Include library procedures and a description of the library program in the Staff Handbook; inform teachers about (1) the collection of non-textbook materials and (2) specific items which should be checked out for the year.

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V. Student Population

____ Review permanent records of students transferring by boundary change and others entering in August; for each new student complete a Placement Sheet.

____ Use Student Cooperative Association (SCA) Manual and folders of previous activities to plan and draft this year's expectations; discuss plans with faculty sponsor prior to teacher return; include appropriate information in the Staff Handbook.

____ Study School Activity Funds Manual and note topics for reference; learn local procedures.

____ Study the regulation on pupil placement outside the attendance area of residence (2250)* and change in school assignment during the year (2260)*; make notes for use in processing applications.

____ Assign students to teachers; give lists to secretary for grouping permanent records by class and typing official class lists of names from permanent records.

____ Establish procedures for processing student transcript requests; include in Administrative Handbook and Office Handbook. Write transcripts as requested.

____ Meet with patrol sponsor and student officers; establish posts and assign patrols; determine procedure for all assignments to be communicated prior to the first day of school (callor mail); publish assignment list; keep record of notification plan.

____ Communicate procedures for management and activities of safety patrols (student), including classroom teacher's follow-up of patrol reports; include in the Staff Handbook.

____ Review current school discipline procedures for compatibility;* add to Staff Handbook list of steps to insure due process for students; develop forms to be used with delinquent students.

____ Brief secretaries on registration procedures, particularly immunization requirements. (Be sure Doctors have dated all immunizations.)

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VI. Physical Plant

____ Check to assure adequate supply of furniture; report to Area Office in writing any undelivered orders, or request furniture for unexpected needs.

____ Plan the inventory check list; write delegated procedures for secretary, librarian, custodian, food services manager, etc.

____ Review regulation on building use now and process the applications; call those in conflict or those disapproved.

____ Walk through and check the building daily, in August and throughout the year; note general appearance, appropriateness for instructional program, maintenance needs, and safety problems; follow up immediately.

____ Survey the building to list and report in writing any repairs or lost equipment to be replaced/funded by summer programs.

____ Schedule unfinished summer cleaning for completion before teachers arrive; if need is projected, request in writing now additional help from the Plant Operations Supervisor.

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VII. Calendar and Time

____ Confirm and communicate school opening and closing times; determine bell schedule; request clock to be adjusted, if necessary.

____ Review "Reports Needed From Schools" (Notice 1335)* to project approximate calendar times for the current year; if notice is issued again, record exact due dates; if not, hold old notice in easy access folder for reference.

____ Check calendar of religious holidays for use in scheduling school events.

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VIII. Budget Matters

____ Review print-out of budgeted allocations; organize a system for controlling accounts.

____ Write justifications for budget requests, and inservice schedule; involve Area Curriculum Specialists in faculty meetings.

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IX. Special Programs and Special Services

____ Determine status of the summer psychological evaluations; plan next steps.

____ Keep a special list/folder of information about new students who appear to need special services.

____ Make specific procedural plans for using the school psychologist; submit to Area Student Services Coordinator for support/approval; revise as necessary; distribute to psychologist and to Area Student Services Coordinator; include in Staff Handbook.

____ Plan for implementation of special programs, identify pupils in each; Learning Disabled (LD), Reading, Gifted/Talented (G/T), English as a Second Language (ESL), Speech and Hearing.

____ Review/revise/develop plans for the school-based G/T program:

. theme and objectives
. division by time periods and teachers
. regular classroom activities during the G/T period
. criteria for written plans by each teacher.

Discuss plans with the staff in August.

____ Plan for the use of area specialists/resource teachers in reading and LD; delineate referral procedures; update Staff Handbook.

____ Call parents of students moved to or from special programs; keep chart showing date, person contacted, and exactly what was said.

____ Identify teaching/working space for special teachers (reading, LD, speech, P.E., Music, ESL, hearing, etc.), psychologist, and aides.

____ Meet with school nurse and schedule health screening, the sex education program, scoliosis screening, the preschool screening, etc.

____ Review clinic aide's duties and the program as described in previous communications from the Health Dept.; organize activities of the school health program.

____ Project use of instructional aides and volunteer classroom aides; write procedures and schedules; revise Staff Handbook if needed.

____ Organize and communicate procedures for scheduling volunteer art aides; discuss with team leaders and revise, if needed, before final publication.

____ Coordinate band and strings schedules with Area Administrator; confirm in writing to instructors.

____ Update scheduled immunization requirements, if needed, on registration procedures and Student/Staff Handbooks.

____ List/draft/copy other information which needs to be communicated to special teachers before school starts.

____ Meet with librarian in August; keep a list/folder of information/ procedures to be discussed.

____ Communicate procedures for

. instruction in P.E. and music by classroom teacher.
. coordination of program by specialist.

Revise/update Staff Handbook if needed.

____ Communicate criteria for written plans to be kept by special teachers (P.E., music, library, reading, speech, LD, etc.); include in Staff Handbook; discuss during the inservice week in August.

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X. Publications

____ Establish format and guidelines for writing Staff Newsletter and Parent Newsletter; scan previous issues for "Do" and "Don't" and compile quotes to be used.

____ Develop Administrative Handbook.

____ In preparation for revision of Staff Handbook call Personnel to determine status of their work on the handbook; request in writing any available sections.

____ Compile notes/inserts kept in Staff Handbook by office personnel during the past year; revise/add administrative direction as needed.

____ Review last year's memos and newsletters to anticipate and write needed articles for Staff Handbook.

____ Make a list of handbook sections for which time is not available in August; complete them in September.

____ Determine and delineate for staff (1) the guidelines for writing duplicated communications, and (2) requirements for principal approval of all drafts before preparation of the copies to be distributed to staff or parents.

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XI. Evaluation

___ Make notes of ideas for personal Evaluation by Objectives (EBO) targets for the year.

___ Review regulations on

. Evaluation of Educational Employees (4610.3)*
. Grievance Procedure (4031.1)

to plan concurrent activities for supervising the instructional program and evaluating teachers.

___ Update files in administrator's office(s); transfer official evaluation form from last year's working file to the school personnel file; write specific procedure for filing secretary to follow.

___ Plan for September classroom observations; draft the criteria to be used (on checklists or dittoed forms); review procedures for formal and informal observations.

___ Make notes for the year's targets (by individual teacher) identified in August work; keep folder (easy access) EBO Planning for the year.

___ Review/revise the formal observation form for EBO; if changed, revise Staff Handbook and other references.

___ Plan and conduct meetings with all groups of employees to discuss evaluation procedures and job expectations.

. Secretaries (Aug. or Sept.)
. Custodians (Aug. or Sept.)
. Educational personnel (First meeting in August)
. Food services personnel (September)

Draft agendas for the meetings.

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XII. First Day/First Week Planning

____ List specific activities for administering first day/wk. in September;

. Check and report transportation problems.
. Check kindergarten and talk with parents if needed.
. Check enrollment to verify appropriate number of staff.
. Assure proper desk size for all students while visiting classes briefly to be introduced by teacher.
. Note general manner of teachers with students.
. Identify students not placed appropriately, if any.
. Etc.....

____ Compile a list of items to be sent home the first day in student brown envelope; issue to teachers.

____ Determine and communicate procedures regarding school pictures; confirm and record the dates.

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XIII. End of the Year Planning

____ Completion of Cumulative Records (information should be current)

Date of Birth
Birth certificate number
Present address (in pencil)
Children in family (any additions)
Standard test scores
Latest picture
For Students who are moving, fill in proper section
Grades and promotion information

____ List of students not returning to Fairfax County should be turned into office.

____ Certain blank forms, health and dental, should go home with final report card.

____ All materials/equipment should be turned into the proper place:

Art
PE
Games
Library books, kits, and AV equipment
Textbooks

- damaged textbooks must be charged to individual student
- list number of textbooks needing to go to Bindery
- keep list of students who owe fees for damaged library or textbooks

____ Each teacher must turn in keys (labeled), official handbooks, and professional development books; and an inventory of small classroom equipment locked in desk.

____ Classrooms should be cleaned out and free of all extraneous matter. File cabinets may remain full if masking tape is used to seal the drawers.

____ Verify all employees' summer addresses. (Paychecks will be sent home during summer.)

____ Equipment needing repair should be tagged separately by teachers.

____ Submit the following reports to area offices:

- Principal's summer residence and telephone number in case of emergency during summer vacation.

- Name, addresses and phone numbers of president, secretary, and treasurer of PTA or PTO for upcoming school year.

____ Submit to the Department of Financial Services:

. musical instrument repair fees
. school building use rental and/or custodial fees
. lost and damaged property fees (note on check)
. out-of-county tuition fees
. time and attendance for custodians after school closes
. all in-county travel vouchers
. all drawing account reimbursement vouchers for current fiscal year
. telephone bill remittance sheet
. school board petty cash reimbursement requests and final monthly report of petty cash fund activity

____ Prepare an inventory of all equipment needing repair for the Office of Maintenance Services. Use proper tags and forms and place them in a secure place.

____ Submit to area fund manager one check for tuition and transportation fees collected for students to attend the area summer school. Copies of the registration forms and remittance advice sheet must accompany the check.

____ Return the typewritten original and two copies of the annual instructional media report for Virginia Public Schools to Library Services, James Lee Media Center.

____ Send the final End-of-the-Month Membership Report to the Office of Records Management.

____ Submit the five School Activity Fund reports to area office. (FS Forms 30, 31, 32, 33, and 35)

____ Contact Office of Plant Operations Services for information on carpet cleaning.

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Fairfax County Schools, Fairfax, Virginia
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